QGate

PowerEntry FOR SALESLOGIX

Version 6.2

User Guide

Document Version 2.1

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Notices

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Disclaimer

Although every effort has been made to ensure the processing performed by this software product will not damage or corrupt your data, we strongly recommend you perform the following actions to safeguard against such eventualities.

In the unlikely event that data becomes lost or corrupted, QGate Software Limited cannot be held responsible.

Recommended Safeguards

Perform a complete backup of your SalesLogix database before installing this product.

Table of Contents

About this Guide

This guide provides an outline to using the features of PowerEntry™ and intelliSearch™ for SalesLogix.

The purpose of this guide is to assist SalesLogix users in using PowerEntry and intelliSearch in the vanilla and generic form.

Your implementation of PowerEntry may differ from some of the illustrations outlined in this guide, so for further information and guidance on how to use these customisations please contact your PowerEntry software supplier.

This Guide outlines the following:

- PowerEntry Overview
- intelliSearch Overview
- Accessing PowerEntry
- Adding new Accounts and Contacts
- Inserting new Contact to an Existing Account
- Editing existing Account and Contact details.

Additional Reference Information

For details on getting started with (installing and configuring) PowerEntry™ for SalesLogix and intelliSearch, see the *PowerEntry Getting Started Guide.*

For details on implementing, customising and developing solutions with PowerEntry™ for SalesLogix, see the *PowerEntry Implementation Guide*.

For details on PowerEntry™ Address Management, see the *PowerEntry Address Management Integration Guide*.

For additional reference information on PowerEntry™ and intelliSearch™, see the QGate Knowledge Base at knowledge.QGate.co.uk

For up to date information on PowerEntry™, intelliSearch™ and other QGate products, please visit the QGate Software web site at www.QGate.co.uk

What is PowerEntry ™

PowerEntry Overview

The QGate PowerEntry module has been designed to simplify and speed up the adding or editing of Account and/or Contact basic details, while at the same time ensuring that the highest standard of data entry is maintained.

PowerEntry is designed as a streamlined data entry point, incorporating the new intelliSearch technology from both the internal Insert New Contact/Account functionality and as a separate search function which can be accessed independently.

Pre-emptive Duplicate Avoidance

Duplicate data can be a major problem for companies operating a Data Management System and can have a damaging effect on both users and the company.

Inaccurate reports, inflated or deflated sales figures, duplicate Account and Contact information. Any inaccurate information can have a dramatic effect on both business and staff, creating a lack of trust with the system and de-motivating staff at all levels.

Having entered contact and/or account information, PowerEntry searches the database for potential duplicate records based on the options you select before committing the new record to the database.

Address Management

PowerEntry also provides optional integration with some of the Worlds leading Address Management systems, to provide global address lookup and verification.

PowerEntry is not supplied with any Address Management Software. All Address Management Software must be purchased separately, however PowerEntry allows easy integration of these systems into your data entry workflow.

intelliSearch™ for SalesLogix

intelliSearch for SalesLogix is a revolutionary new data search engine for SalesLogix, providing intelligent "fuzzy" search capability within your SalesLogix application.

In addition to the standard Account / Contact look-ups, and Account and Contact Searches, intelliSearch provides a powerful and sophisticated alternative to direct name finding.

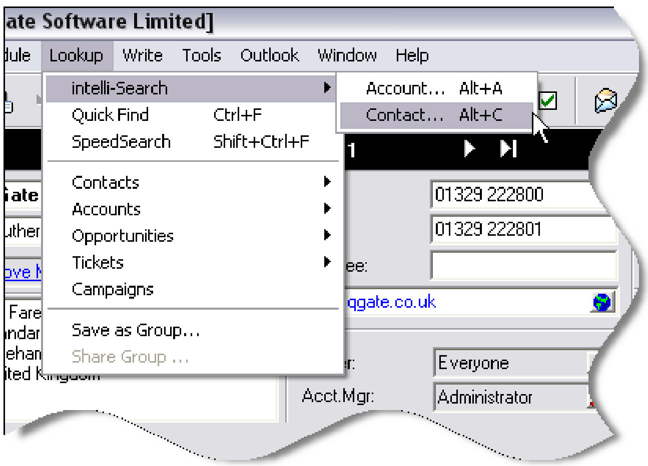
Imagine needing to find a Contact at a particular Account, but all you can recall is perhaps the name "john" and the account was "*something* Manufacturing…?".

intelliSearch with its sophisticated fuzzy logic, will find all occurrences of the name "John" (including: Jon, Jonathan, Jonny etc), at Accounts containing "Manufacturing" somewhere in the name.

Using intelliSearch

The intelliSearch feature is available inside PowerEntry functionality and from the following access points:

- From the SalesLogix Menu, **Lookup** > **intelliSearch** > **Account…** or **Contact…**



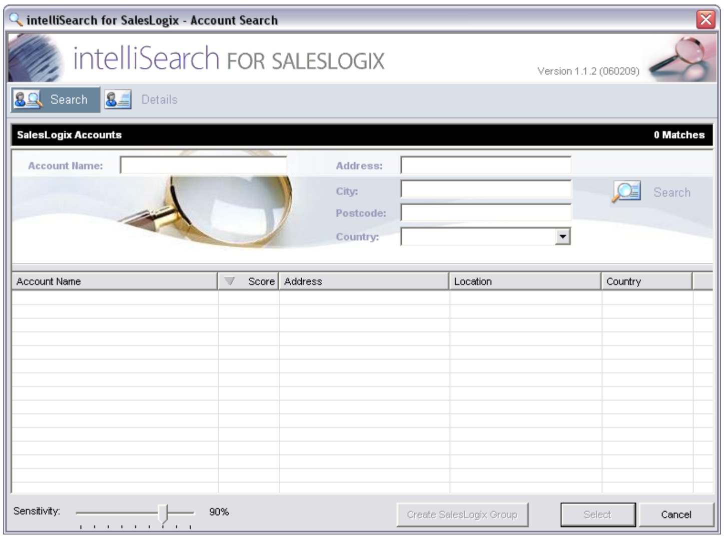
- Hot keys, **Alt** + **A** for a account search
  Alt + **C** for a contact search

- From the **Account** Navbar button by clicking the right mouse button and selecting the **intelliSearch > Account…** option

- From the **Contact** Navbar button by clicking the right mouse button and selecting the **intelliSearch > Contact…** option

intelliSearch Accounts

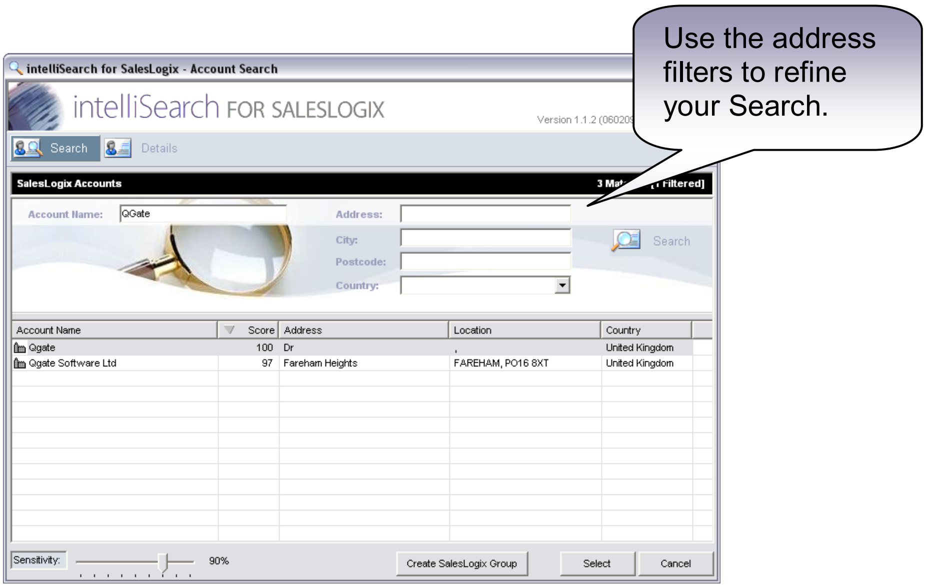
1) From the SalesLogix Menu select, **Lookup** > **intelliSearch** > **Account…**



2) Click in the **Account Name** box and type the name of the account

3) Click on the **Search** button, **Enter** key

If a possible matching account is found on the database then intelliSearch will list all possible matches.



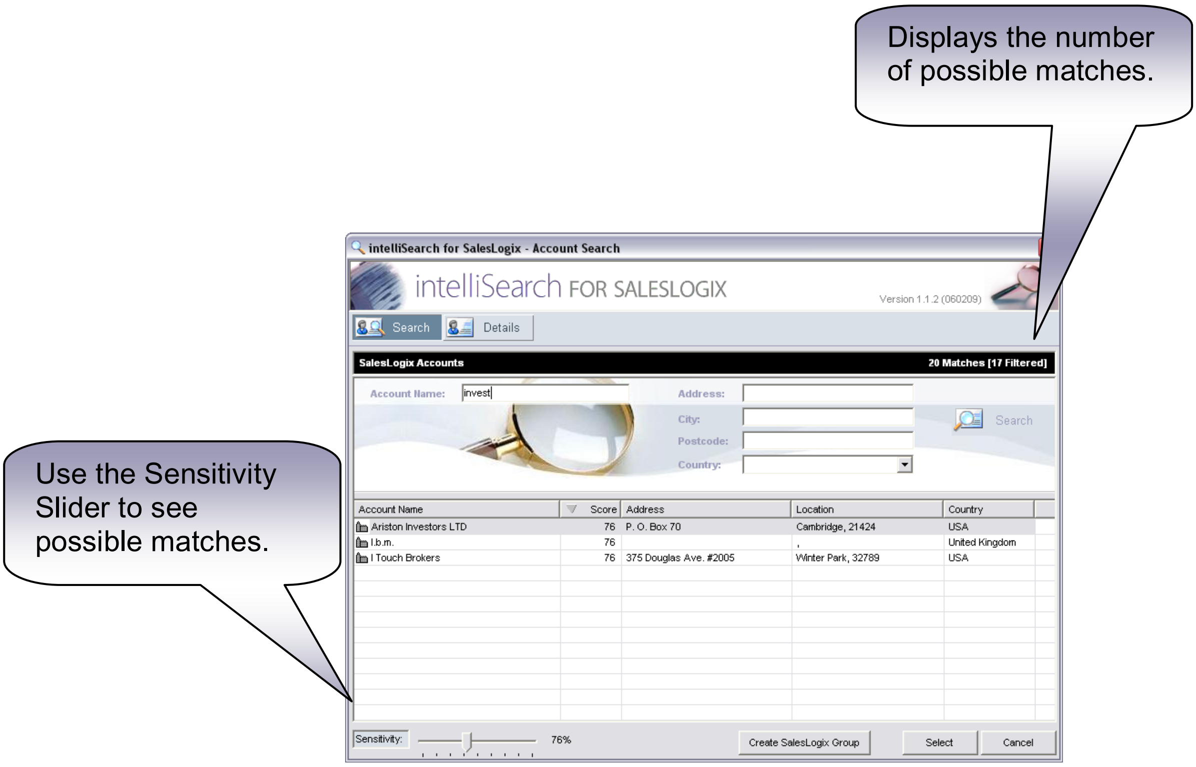
4) If you know any additional address information that will help filter your search, type into the **Address**, **City**, **Postcode** and/or select the relevant **Country** then **Search**

Sensitivity

intelliSearch uses a revolutionary new data search engine for SalesLogix, providing intelligent “fuzzy” search capability throughout your SalesLogix application. The “fuzzy” search capability is determined by the Sensitivity slider at the bottom of the intelliSearch dialog where 60% will enable a very “fuzzy” search, to a 100% setting that will be an exact match of the entered details.

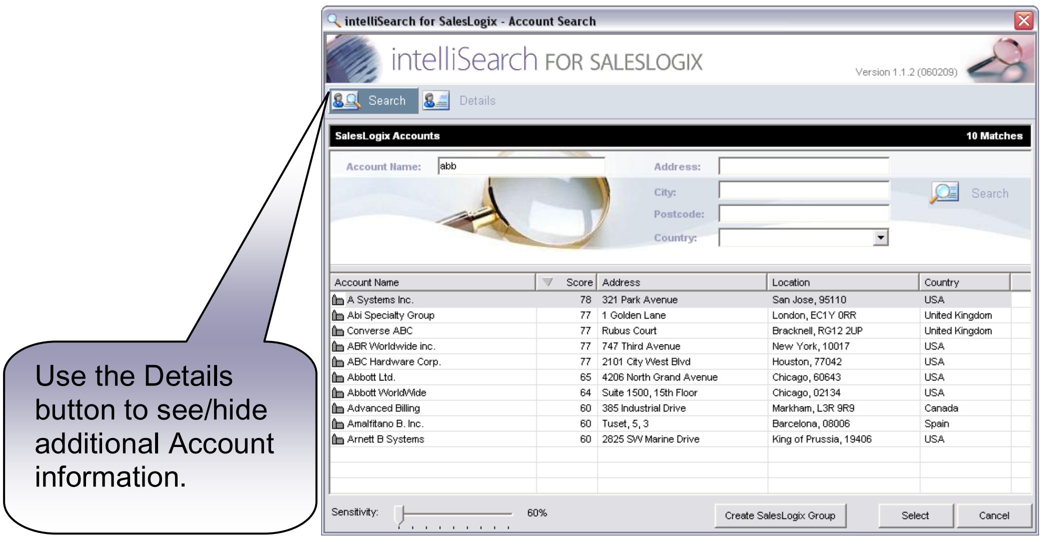
The intelliSearch engine will apply a score for each of the possible matches it finds in the database. If the Match Score is in the high 90’s then there is a very high possibility that the account could be a match based on the information given. If the Match Score is in the low 60’s then there is only a slim chance that this is a matching account.

If intelliSearch locates a possible matching account but the Match Score is below the current Sensitivity level, it will not be displayed although it would be included in the number of Matches stated on the Status bar.



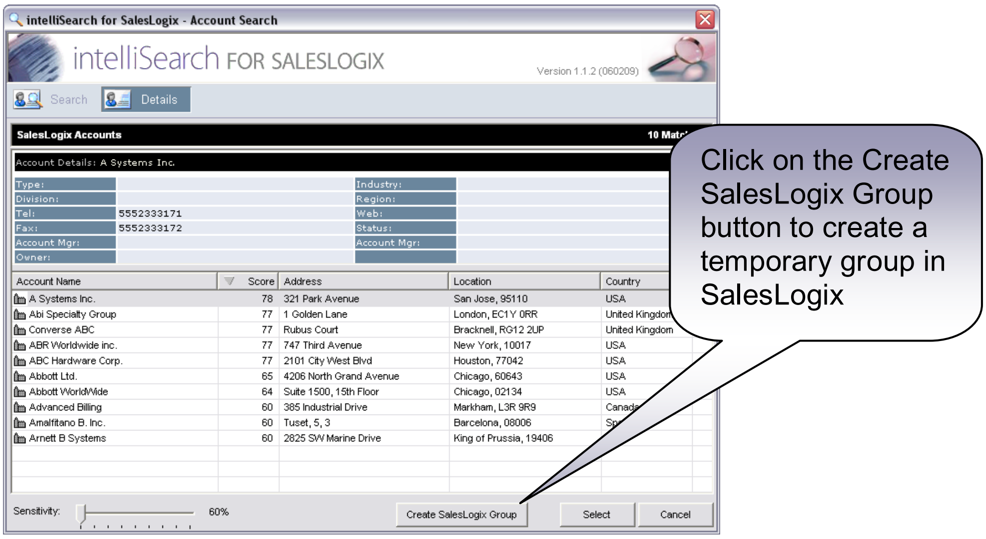
5) If the intelliSearch Account results dialog does not display any Matches but displays **X Matches** on the Status bar and the Sensitivity box is flashing Green/Red, this will indicate that X Matches have been found but the Match Score is below the displayed level

6) Slide the **Sensitivity** slider to the left until a number of matching accounts are displayed



7) If the intelliSearch result list is too long enter further values in any of the address boxes then click on the **Search** button to refine your search

8) If you locate a possible matching account but need to examine the details further before deciding if this is a matching account, click on the account name then the **Details** button



9) If you find the account you are looking for, click on the account name in the list then the **Select** button or **Enter** key

10) Click on the **Create SalesLogix Group** button to create a temporary group in SalesLogix

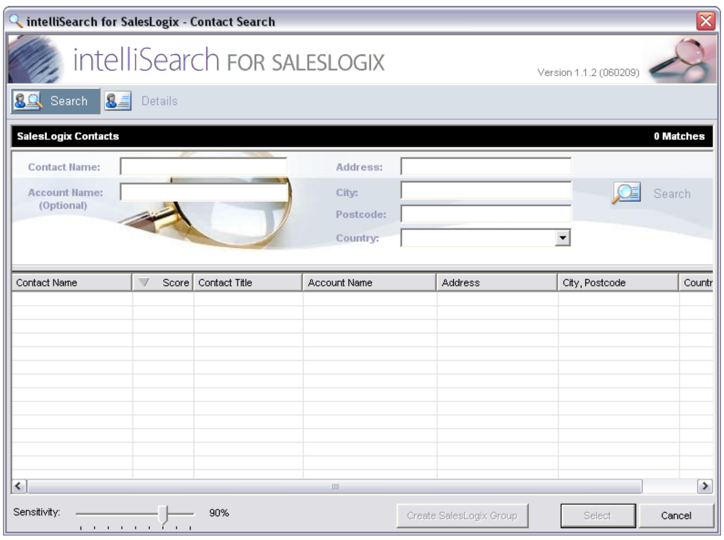
The group will be displayed on the Account, Lookup Results tab.

If you want to save this group:

Go to the Account list view and click on the Lookup Results tab.
From the menu select Lookup, Save As Group.
Name the Group then click OK

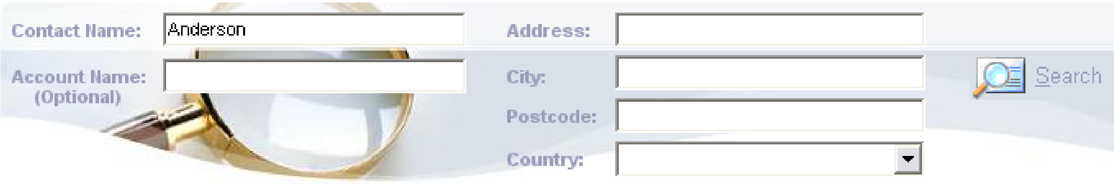
intelliSearch Contacts

11) From the SalesLogix Menu select, **Lookup** > **intelliSearch > Contact…**

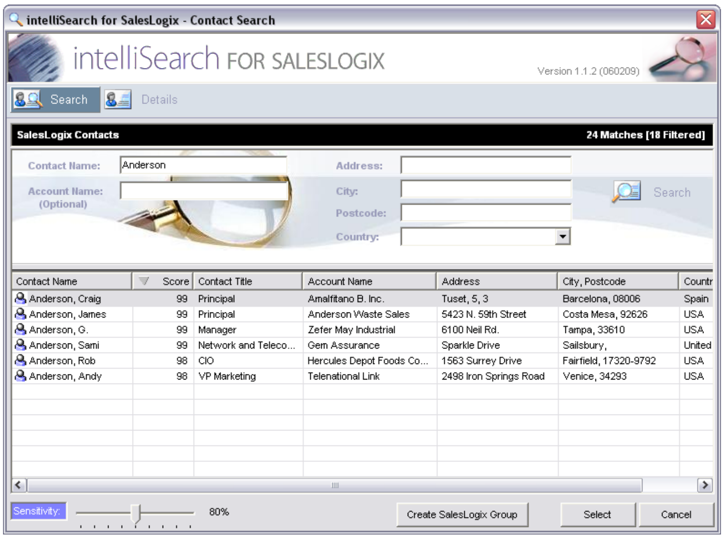


12) Click in the **Contact Name** box and type the name of the Contact

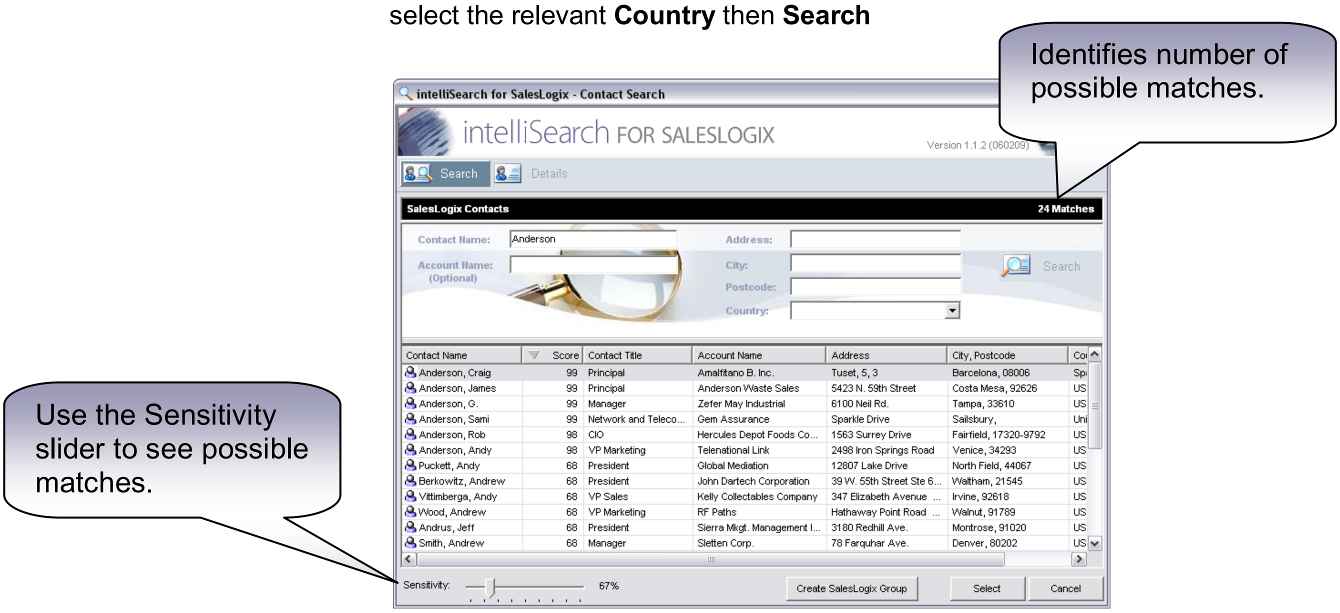
13) Click on the **Search** button, **Enter** key or **Alt** + **S** keys



If a possible matching contact is found on the database then intelliSearch will list all possible matches.

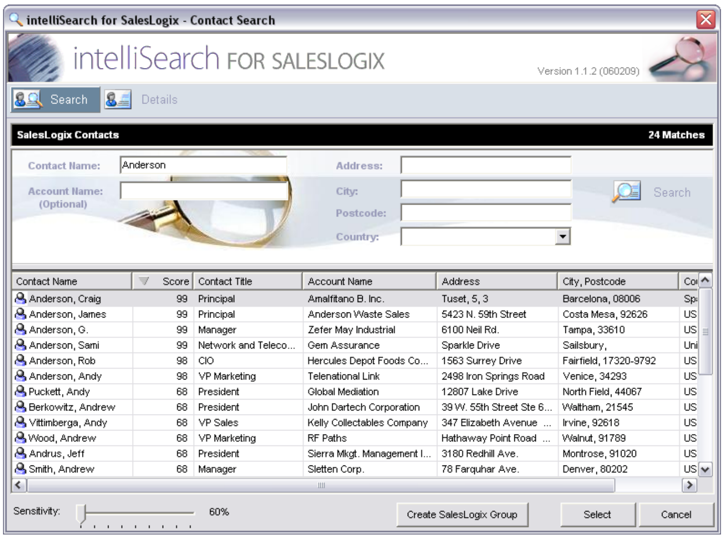


14) If you know any additional address information that will help filter your search, type into the **Account Name**, **Address**, **City**, **Postcode** and/or select the relevant **Country** then **Search**



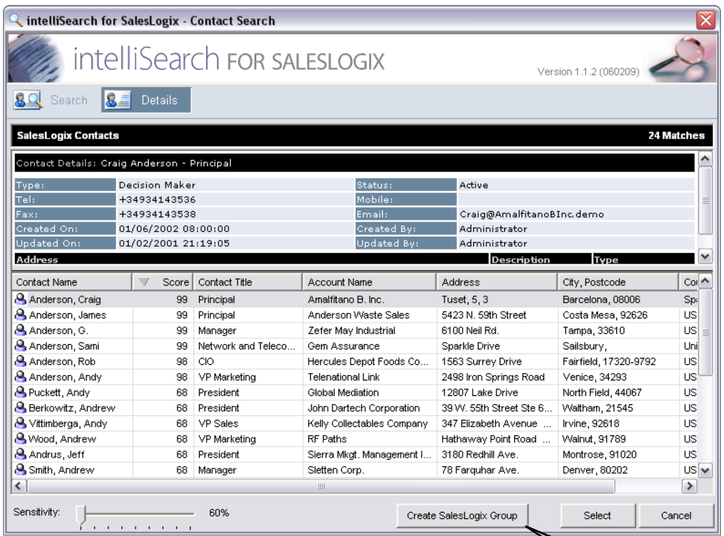
15) If the intelliSearch Contact results dialog does not display any Matches but displays **X Matches** on the Status bar and the Sensitivity box is flashing Green/Red, this will indicate that X Matches have been found but the Match Score is below the displayed level

16) Slide the **Sensitivity** slider to the left until a number of matching Contacts are displayed



17) If the intelliSearch result list is too long enter further values in any of the address boxes then click on the **Search** button, **Enter** key to refine your search

18) If you locate a possible matching Contact but would need to examine the details further before deciding if this is a matching contact, click on the Contact name then the **Details** button



Click on the Create SalesLogix Group button to create a temporary group in SalesLogix

19) If you find the Contact you are looking for, click on the Contact name in the list then the **Select** button

20) Click on the **Create SalesLogix Group** button to create a temporary group in SalesLogix

The group will be displayed on the Contact, Lookup Results tab.

If you want to save this group:

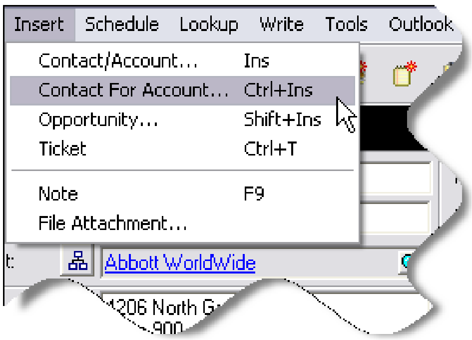
Go to the Contact list view and click on the Lookup Results tab.
From the menu select Lookup, Save As Group.
Name the Group and OK

Accessing PowerEntry

PowerEntry can be accessed from the same access points as the standard SalesLogix when adding a new account with additional selections to add a new contact for an existing account.

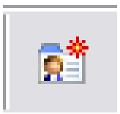
From the Account/Contact Detail or List view, there are multiple ways to access the PowerEntry form.

1) From the Menu Bar, just click on the **Insert** option



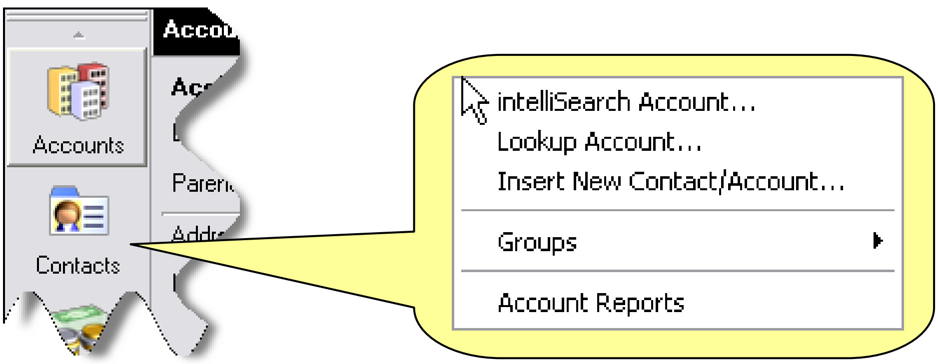
The Insert menu option will allow the user to add a New Account and Contact or Add a New Contact to an existing Account

2) From the Toolbar, just click on the **Insert Contact/Account** button to add a new Account/Contact.

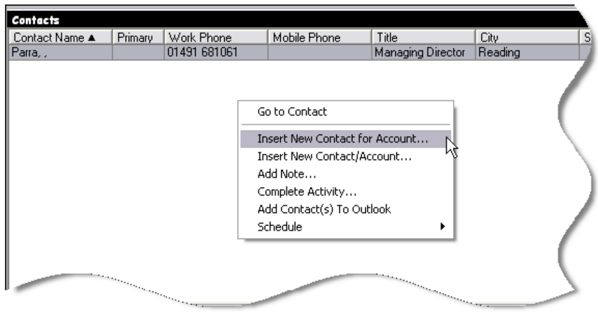


Note. The button images could vary depending on the version and of SalesLogix you are using.

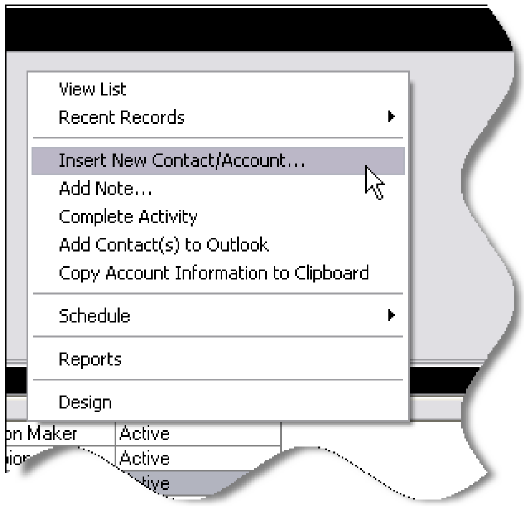
3) From the left hand **NavBar**, click the right mouse button on either the **Contacts** or **Accounts** button to display an options menu.



4) Click the right mouse button on the **Account**, **Contacts** tab to insert a new account and contact



5) Click the right mouse button on the **Account** or **Contact** Detail area to add a new account and contact



Keyboard shortcuts

Insert Key	Opens the PowerEntry dialog to add a new **Account/Contact**
Alt + i then the c key or the Insert Key	Opens the PowerEntry dialog to add a new **Account/Contact**
Alt + i then the a key or the Ctrl+Insert key	Opens the PowerEntry dialog to add a new **Contact for Account**

Contact / Account Overview

SalesLogix is an Enterprise Information Management application controlling information at the heart of your enterprise.

Designed to track information on organisations and individuals, SalesLogix maintains all the underlying relationships between all your customers and their companies.

SalesLogix has a Contact, Account structure where the Accounts are the Companies you deal with and the Contacts are the individuals you deal with directly and are linked to their appropriate Accounts.

- Accounts can be entered without any Contact details.
- Contacts can be entered without entering any Account details.

  SalesLogix will automatically create an Account for this Contact, naming the Account with the Contact's name.

  For example, if you entered the Contact details for say John Smith, SalesLogix would automatically create an Account named **Smith, John**.
- Option to enter a personal record.

The account will be set up using the person's name and the owner's name will be followed by the initials of (Pr)

For example, the user name of Workgroup 1 will become Workgroup 1 (Pr)

What options should I use?

Insert New Contact/Account

Select this option when you wish to create a new account AND contact record.

Use this option also to create a **New Contact** record that is **not associated with an Account**.

For example, you might want to keep a record of your Doctor or Dentists' details.
Dr John Dunhill will appear on the Contact view as Dr John Dunhill.
An Account would be created under the name Dunhill, John.

Insert New Contact for Account

Select this option to add a **new Contact** to the currently displayed Account.

If you are in the Contact Detail view then the new Contact will be added to the current Contact's Account.

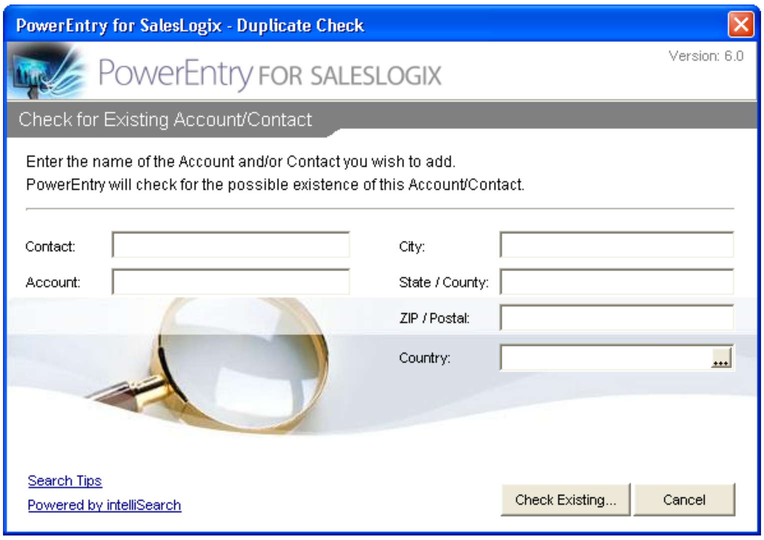
When selecting this option, the Company name and address will be automatically displayed.

Adding New Accounts and Contacts

Account or Contact only details can be entered using PowerEntry. It is not a requirement of PowerEntry to have Contact details added when creating a new Account, or Account details added when creating a new residential contact.

To Add a New Account / Contact:

1) From the Menu select **Insert** > **Contact/Account…**



The PowerEntry duplicate checking dialog will be displayed.

You can enter as much or as little information as you like into the search criteria boxes in order for PowerEntry to check for any existing records.

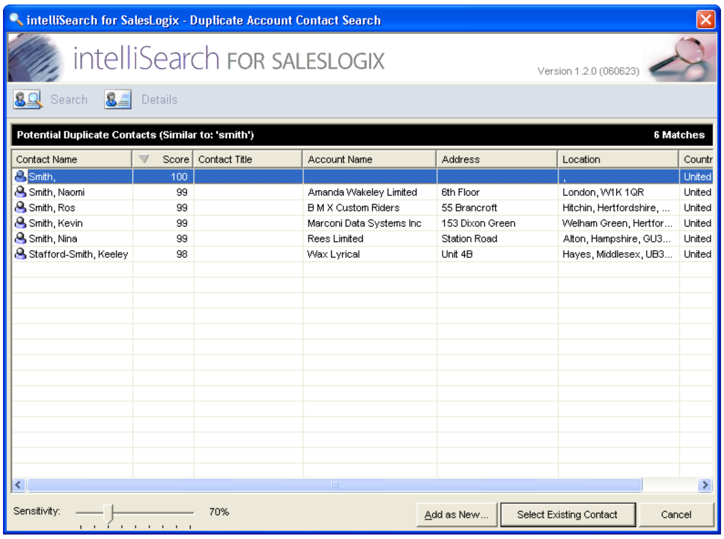
The more information that you enter will restrict the amount of possible returns. For example, if you are checking to see if QGate exists on your database and you also select the country of "United Kingdom" then any possible matching results will return only companies in the United Kingdom.

2) Click in the **Contact** box and type the name of the contact

3) Click in the **Account** box and type the name of the account you wish to enter

4) Enter any additional **Address** information in order to filter the returns of any possible matching accounts and/or contacts

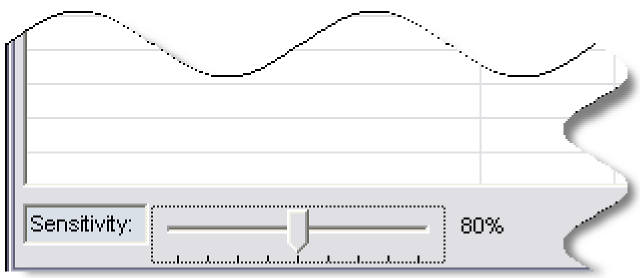
5) Click on the **Check Existing…** button



If there are any possible matching accounts, the intelliSearch dialog will be displayed. If no matching accounts were found, the PowerEntry dialog will be displayed ready to enter the new Contact and Account details

6) If you entered a **contact/account** name in the search criteria, any possible matching contacts or accounts will be listed first. You have the following options:

- If the **Sensitivity** box is flashing, you can move the slider to the left to reduce the level of the search sensitivity and reveal further possible matching contacts or accounts

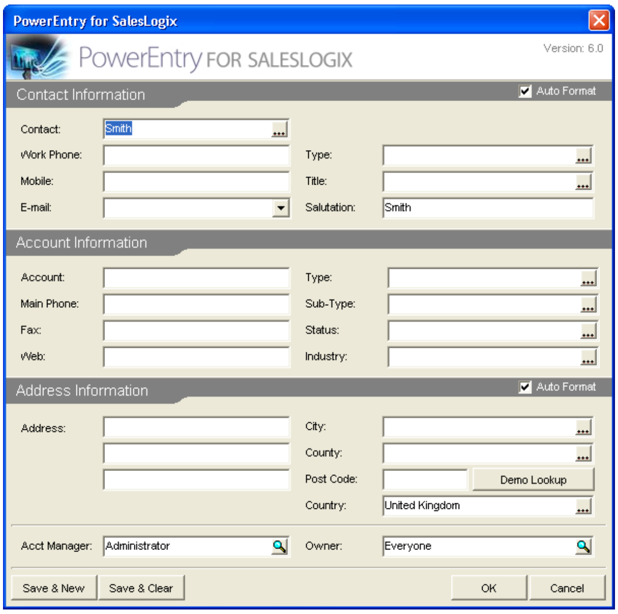


- If the contact/account you require is listed, select the contact/account name then click on the **Select Existing Contact/account** button

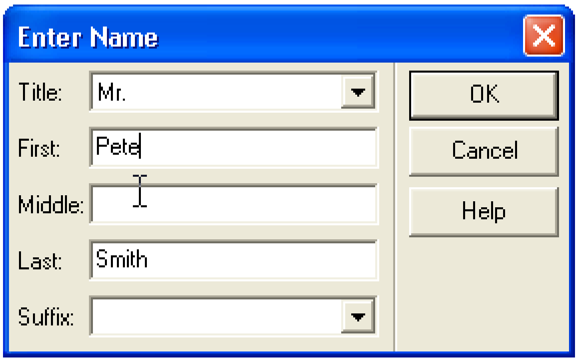
PowerEntry will close and SalesLogix will display the selected contact/account details.

- Click on the **Cancel** button to return to the Check for Existing Account/Contact dialog

7) Click on the **Add as New…** if no correct matching contacts or accounts were found



8) From the **Contact** field, press the **F2** key to confirm the position of the name text in the correct entry fields. Click **OK**



The position of each portion of the name text is critical to the quality of the data in your database. If the Last name is entered in the wrong field, any search on the database will NOT return this entry.

9) Enter the Contact **Work Phone** and **Mobile** details

10) Enter the **Email** address

11) Select from the Contact **Type** and **Title** boxes by clicking on the ellipsis button or pressing the F2 key to open the list

12) The **Salutation** will auto populate with the contact name in the format selected from the PowerEntry Default settings

The Salutation will auto populate in the format as set by your administrator.

13) Enter the **Account** name

14) Continue entering all remaining details and selecting items from the pick lists

15) From the PowerEntry dialog, continue entering **Address** information taking care to enter the relevant information in the appropriate fields.
For Example, the City Name in the City field. County name in the County field

From the address Picklist fields, you can use the F2 key to open the list then type the first character of the name to drill down to the required item.

The Postal Code field will automatically capitalize all the Postal Code text in accordance with postal standards.

16) The **Account Manager** will default to the current user but can be changed if required

17) The **Owner** will default to the setting made in the SalesLogix Options

The SalesLogix Options are accessed from the menu > Tools > Options > Other tab > Default Account Owner field

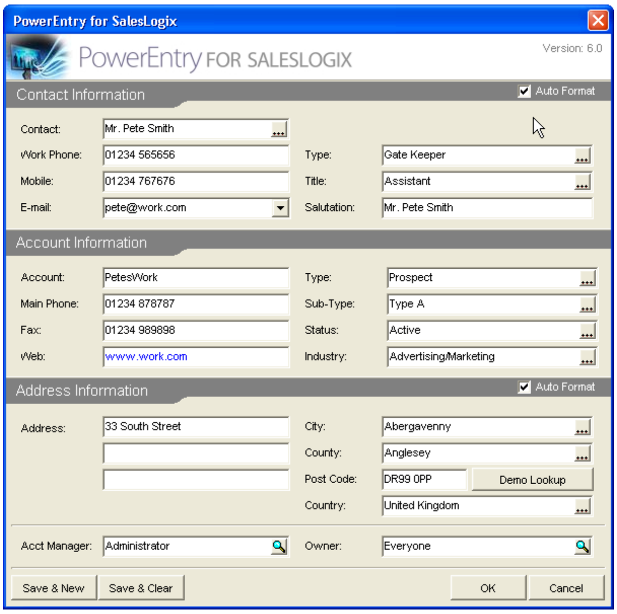
18) Click on the **Auto Format** check box to enable/disable if required

The Auto Format check box if selected will Proper Case (initial capital) the first character of all text in PowerEntry.

If selected and the first two or more characters of a name require capitalized text, then this option will need to be deselected prior to entry. For example, QGate Software or IBM. Common missed-case and names with apostrophes will, however be "corrected"; e.g. McDonald O'Brien etc.

19) Click **Save & New** to save the current contact information and clear the contact details ready to enter another contact at the same account

20) Click **Save and Clear** to save the current Account/Contact information then clear all fields ready to enter a new Contact and Account



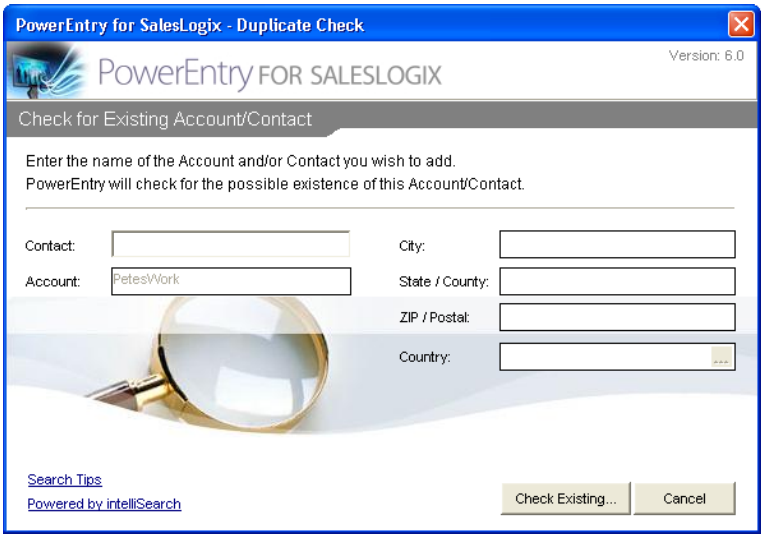
Inserting a New Contact for an Existing Account

The **New Contact for Account** option will enable you to enter a new Contact for the currently selected Account.

If you wish to enter a new Contact's details, but do not want to associate that Contact with any company, you must use the **Insert New Contact/Account** option.

1) Locate the Account that you wish to add the new Contact to

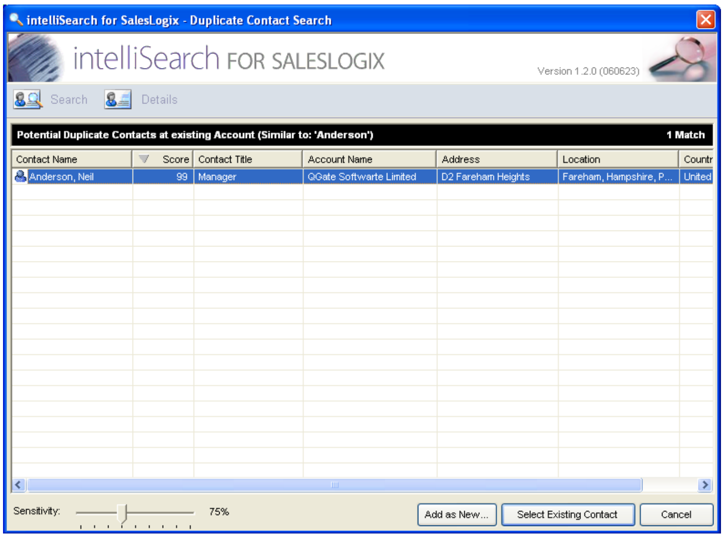
2) Click the right mouse button on the blank area of the contacts tab and select **Insert New Contact for Account** or press Ctrl+Insert



3) Type the **Name** of the contact in the Contact box and/or (optional) address information

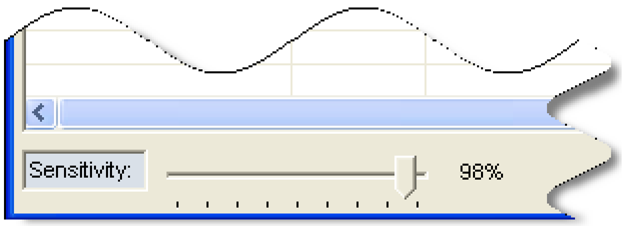
The address information would only be required where additional filters are required to avoid long lists of contacts being returned as possible matches.

4) Click on the **Check Existing…** button



5) If there are any possible matching contacts at the selected account, intelliSearch will return a list where you have the options to:

- If the **Sensitivity** box is flashing, you can move the slider to the left to reduce the level of the search sensitivity and reveal further possible matching accounts



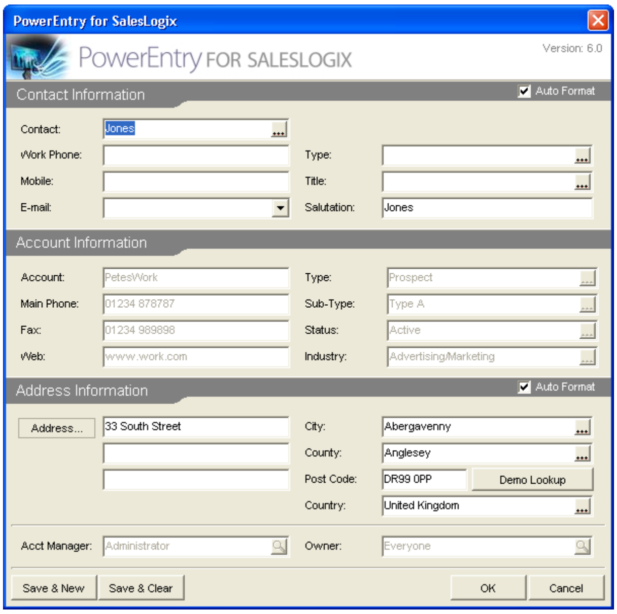
- If the Contact you require is listed, select the Contact name then click on the **Select Existing Contact** button

SalesLogix will display the selected Contact detail view.

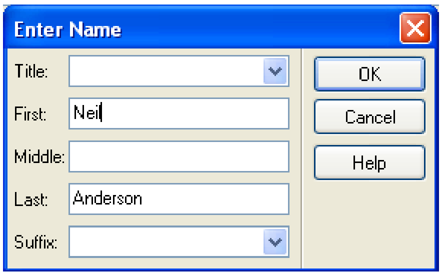
If you Cancelled from the Contact matching dialog and select one of the accounts from the account list, you will be taken to the PowerEntry dialog which will be populated with the account details ready for you to enter a new contact.

- Click on the **Check Existing…** button

PowerEntry dialog will be displayed ready to enter the new Contact and Account details.



6) From the **Contact** box press the **F2** key to confirm the position of the name text in the correct entry fields. Click **OK**



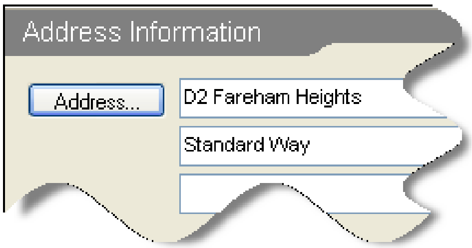
The position of each portion of the name text is critical to the quality of the data in your database. If the Last name is entered in the wrong field then a search on the database will NOT return this entry.

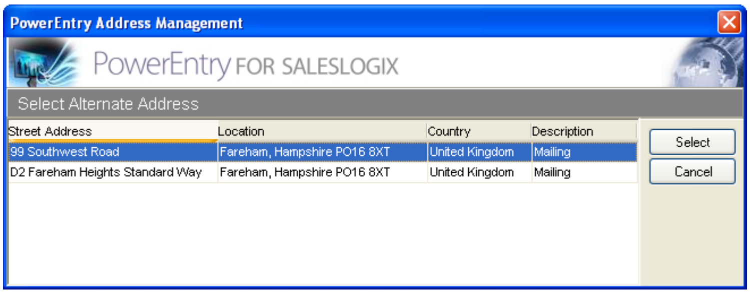
7) Continue entering the contact details and selecting items from the pick lists

You have no access to change the account information

8) The address details can be changed for the new contact without effecting the account address details

9) An existing address for the new contact can be selected by clicking on the **Address…** label button





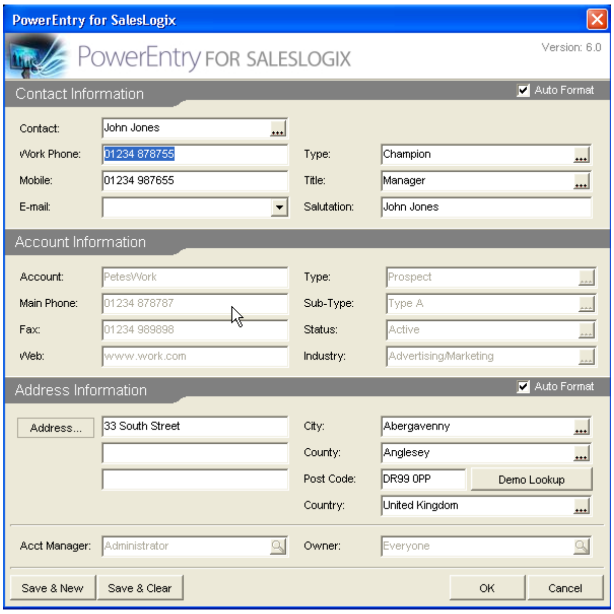
A list of all related account and contact addresses will be displayed

10) Click on the required address from the list then the **Select** button

11) Click **Save & New** to save the current contact information and clear the contact details ready to enter another contact at the same account

12) Click **Save and Clear** to save the current Account/Contact information then clear all fields ready to enter a new Contact and Account

13) Click **OK**

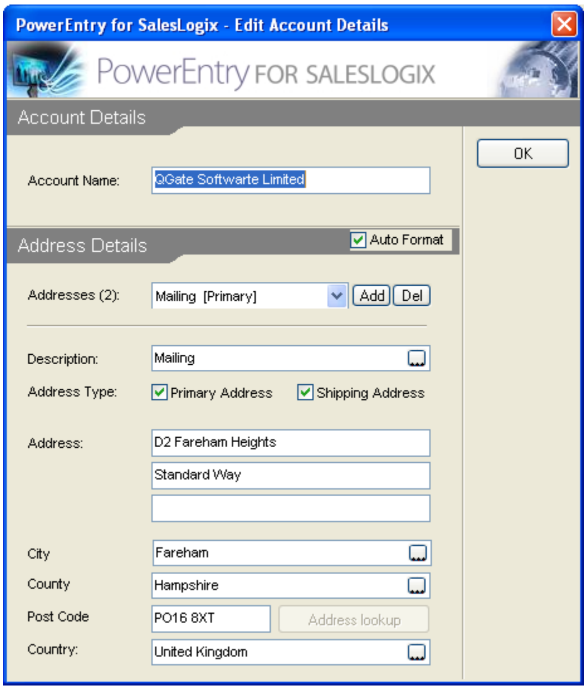


Editing Existing Account / Contact Details

The account name and address details cannot be edited from the SalesLogix main view as these details are managed by the intelliSearch application. Editing the Account name and address are completed using the Edit Account (PowerEntry)… option from the Edit menu.

To Edit the Account/Contact Name and/or Address:

1) From the Edit menu select **Edit Account (PowerEntry)..** option



2) From the PowerEntry for SalesLogix dialog edit the **Account Name** Address description and address details as required

3) Click on the **Add…** button to enter a new address

4) Select or add a new address title for the address you want to enter, Home, Business. Office, etc

5) Enter the new address details

6) Click **OK**

Appendix A – Troubleshooting PowerEntry/intelliSearch

This section provides some assistance in identifying common issues and providing potential resolutions.

intelliSearch/PowerEntry Does Not Finding Any Matches?	
Possible Causes	**Solution**
intelliSearch Match Dictionaries have not been created or updated?	Rebuild the intelliSearch Match Dictionaries – see the section “Configuring/Initialising intelliSearch” of the *PowerEntry Getting Started Guide*.
Search criteria too vague?	Extend the matching criteria – intelliSearch matching is based upon data likeness not begins with.
Search criteria too strong?	If possible remove some of the matching criteria.

PowerEntry/intelliSearch – Technical Support

General

For general technical support on installing and configuring your PowerEntry software, firstly see the trouble shooting section on page 31, or contact your PowerEntry software supplier.

For additional reference information on PowerEntry including FAQ's, How-to's and resolutions to known issues, see the QGate KnowledgeBase at knowledge.QGate.co.uk.

Alternatively, contact QGate Technical Support.

Fault Reporting

If you wish to report a fault or an issue with PowerEntry, please contact your PowerEntry software supplier or contact QGate Technical Support.

Alternately you can register faults at the QGate website at www.QGate.co.uk

Upgrades and Service Releases

Revision upgrades and service releases of PowerEntry may be available on request from your PowerEntry software supplier or by contacting QGate Software.

Warning: We strongly recommend you review the release information provided with each release, to ensure each upgrade is suitable to apply. If you are in any doubt, we recommend you contact your PowerEntry software supplier or contact QGate Software directly.